

vision for the future



EXPLORATION

Automating Your RTO With Zapier and Other Tools

Paul Pellier



NATIONAL VET CONFERENCE
GOLD COAST 2021

#2021NVC



ABOUT: PAUL PELLIER FROM ACCELLIER

Paul runs an RTO called Accellier.

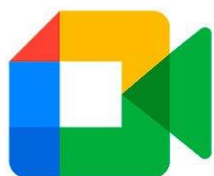
He's obsessed with automating away all the mundane repetitive RTO tasks, so his team can focus on creating amazing learner experiences.

Accellier

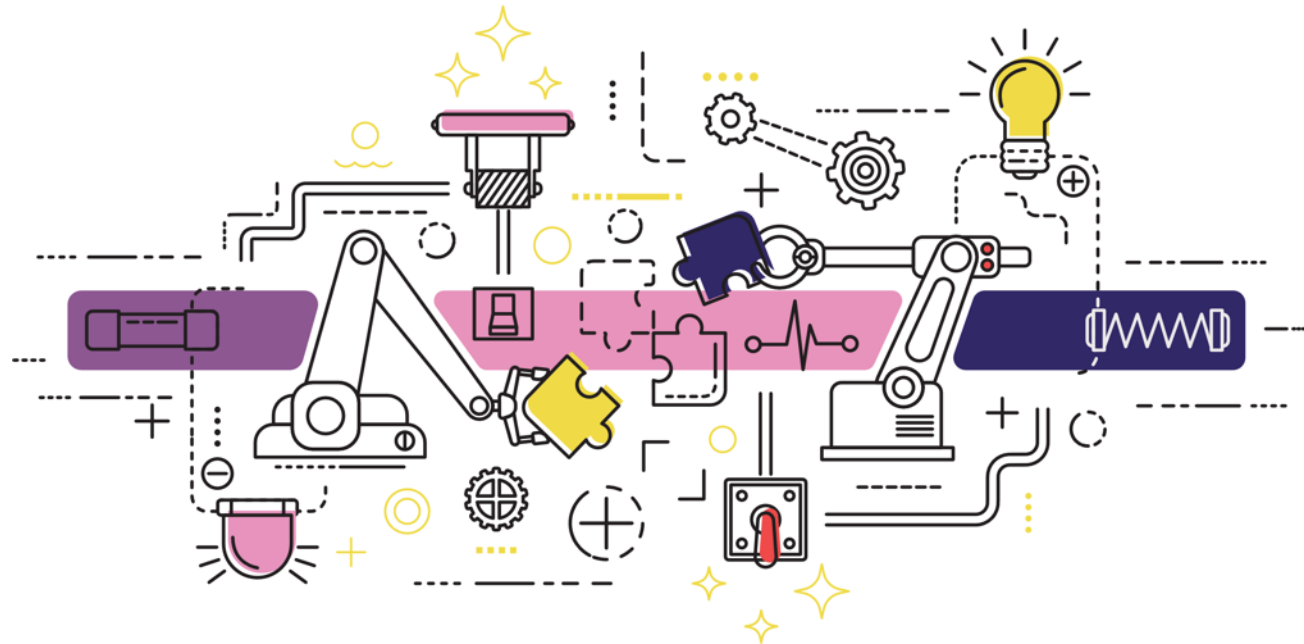
Phone: (02) 5616 0111

Email: paul@accellier.edu.au

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WHAT DO WE MEAN BY AUTOMATION?



WHAT DO WE MEAN BY AUTOMATION?



WHEN ENROLMENT
FORM IS RECEIVED
THROUGH WEBSITE

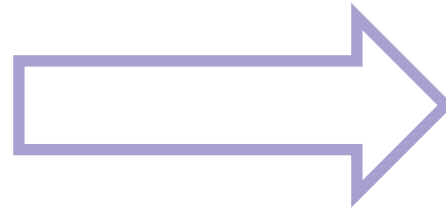


TAKE THEM OFF OUR
MARKETING EMAIL
LIST

WHAT DO WE MEAN BY AUTOMATION?



WHEN A STUDENT
JOINS OUR ZOOM
MEETING



LOG THEIR
ATTENDANCE IN A
SPREADSHEET

WHAT DO WE MEAN BY AUTOMATION?



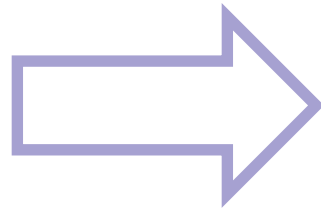
NEW EMAIL TAGGED
'CONTINUOUS
IMPROVEMENT'



MAKE A NEW CARD
IN TRELLO TO
COMMENCE
CONTINUOUS
IMPROVEMENT
TASKS KANBAN

WHAT DO WE MEAN BY AUTOMATION?

WHEN SOMETHING
HAPPENS



AUTOMATICALLY DO
SOMETHING ELSE
WITH THAT INFO

WHAT DO WE MEAN BY AUTOMATION?

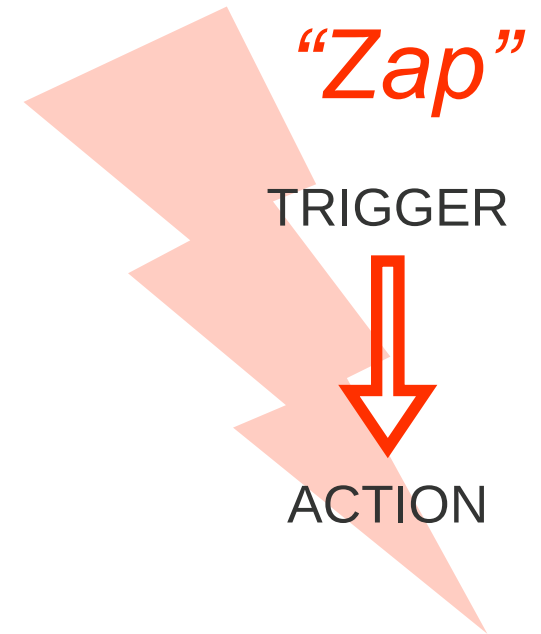




A platform that connects apps and automates workflows

3000+ apps

“Easy automation for busy people. Zapier moves info between your web apps automatically, so you can focus on your most important work”

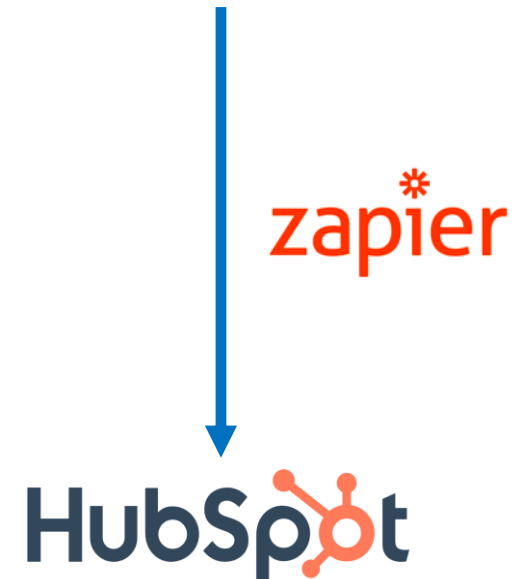


QUICK EXAMPLE: TRIGGER AND ACTIONS

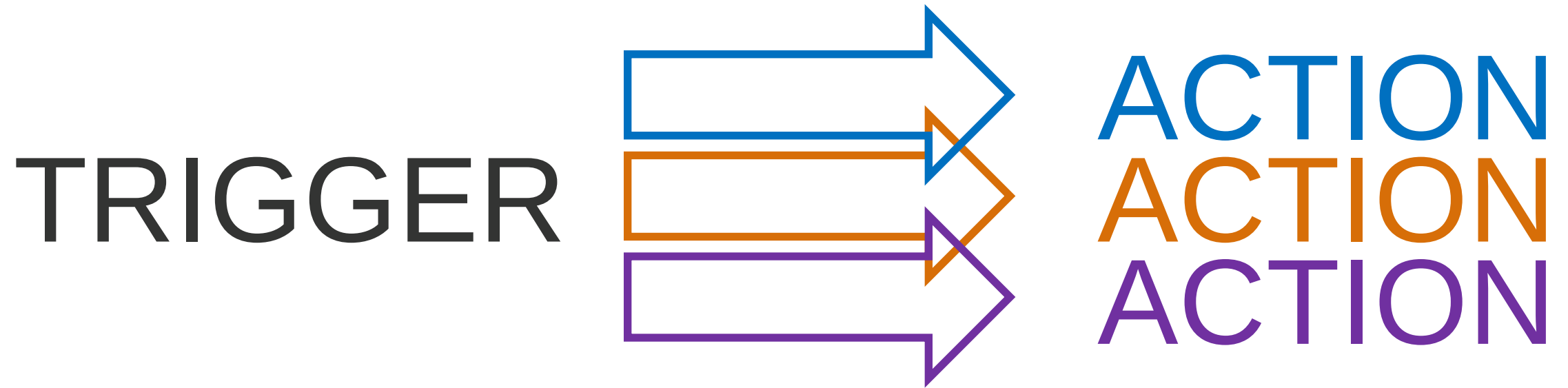
When a student books an appointment in Calendly, add a note into Hubspot (CRM)

Benefits:

- Eliminates data entry
- Improves compliance (record of student engagements)
- Improves team communication and awareness



WHAT DO WE MEAN BY AUTOMATION?

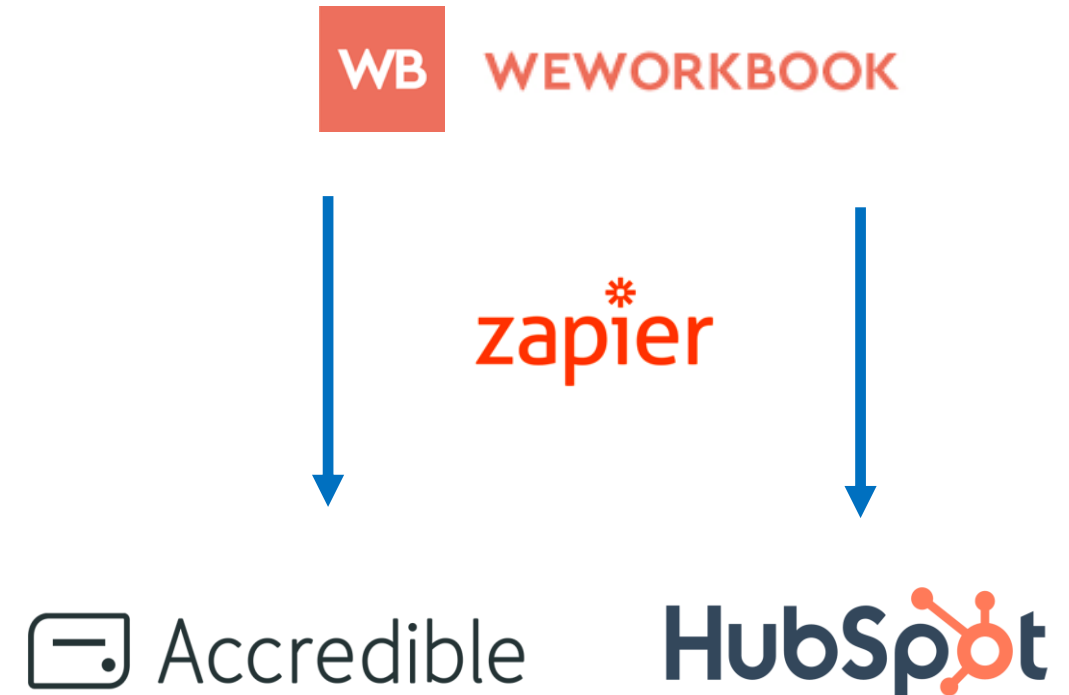


WORKED EXAMPLE: TRIGGER AND ACTIONS

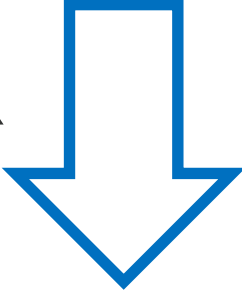
When a student is deemed competent in the SMS, issue them a digital badge, and make a note in the CRM

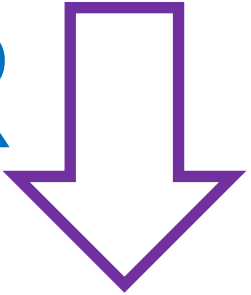
Benefits:

- Improves student motivation, engagement and recognition
- Improves team communication and awareness



WHAT DO WE MEAN BY AUTOMATION?

TRIGGER 

ACTION - TRIGGER 

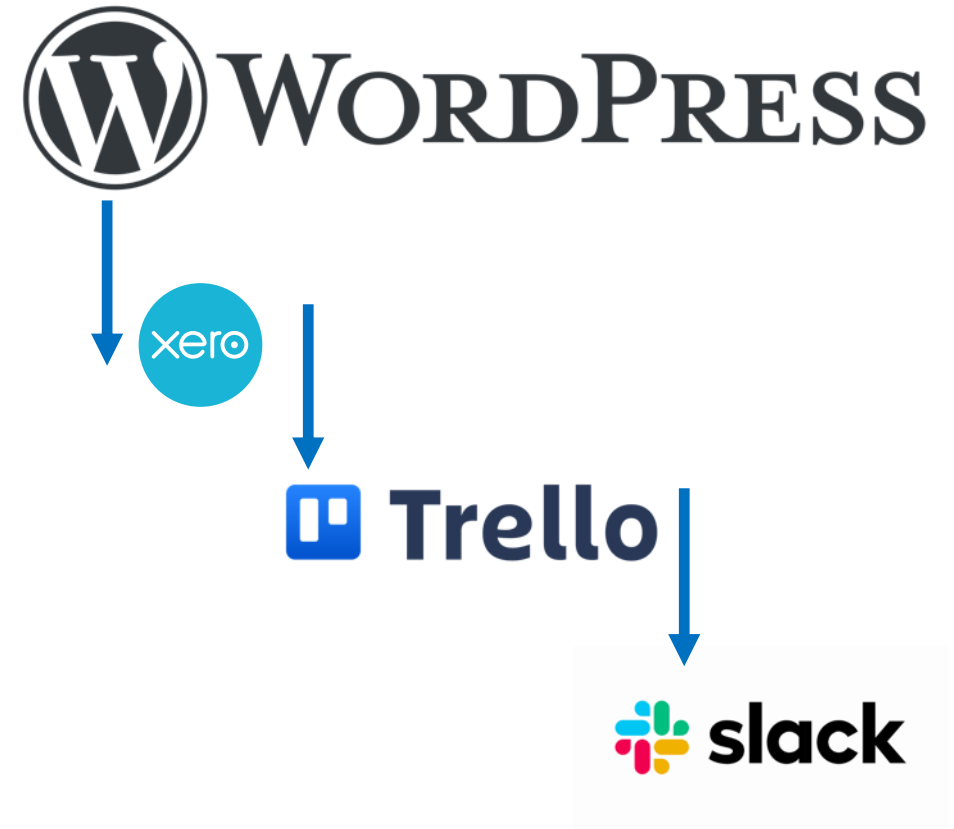
ACTION

WORKED EXAMPLE: TRIGGER AND ACTIONS

When a student enrolls via our website, raise an invoice in Xero, add a card in Trello, and send a message in Slack

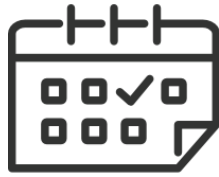
Benefits:

- Reduces data entry
- Improves team communication and awareness
- Allows quicker action to be taken



AUTOMATION AND CONNECTION STRATEGIES

RTO



CLIENT

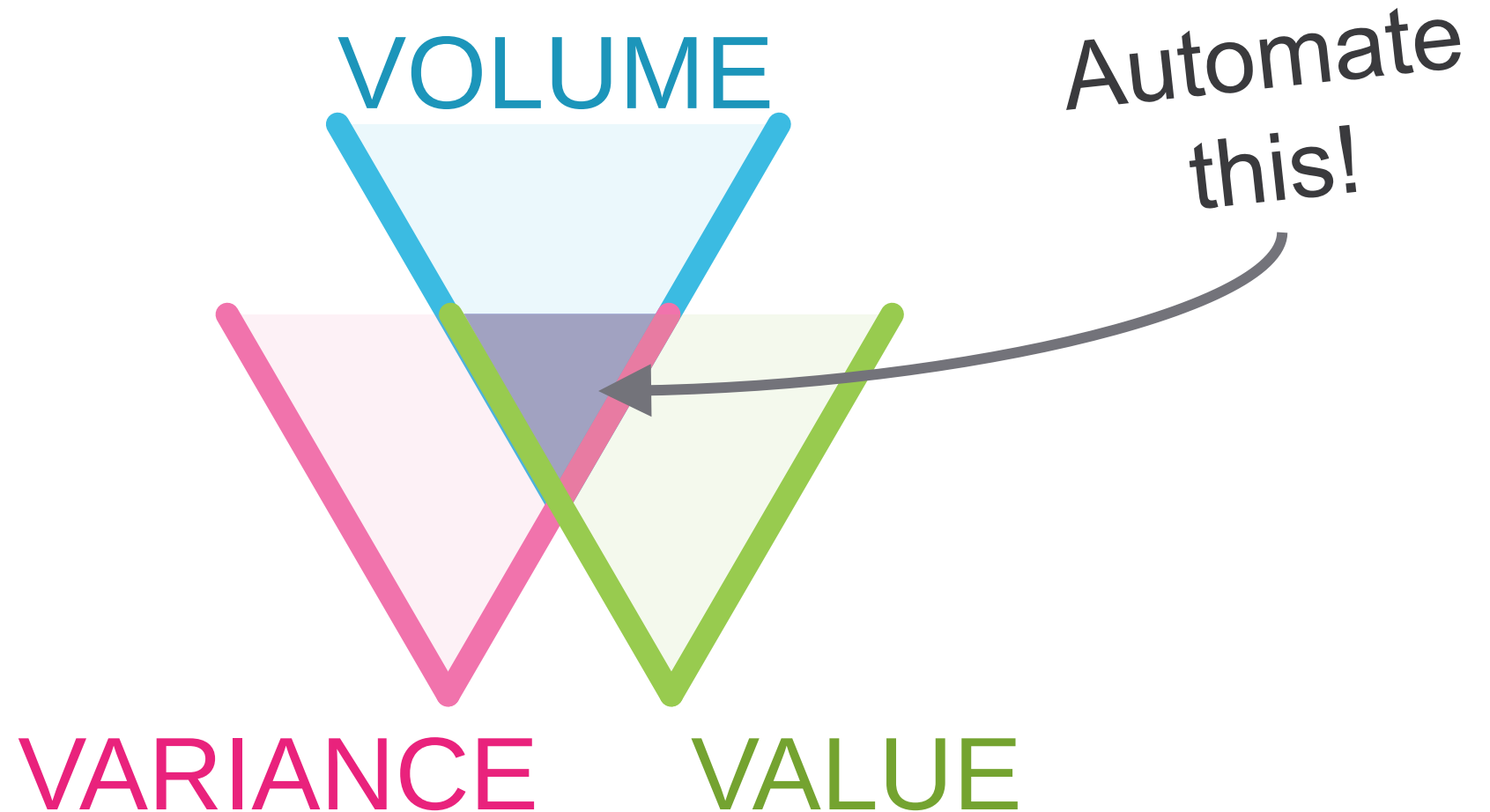


BENEFITS OF AUTOMATION: EFFICIENCY

How much time would we save each year if we **halved** a repetitive 3-minute record-keeping task, performed around 10 times a day each by a team of 5 trainers?



THE THREE VEES



WHAT'S ONE THING YOU COULD AUTOMATE?

- Nothing too complex – it could be a simple sub-task
- Consider the three Vs:
 - Volume – does it happen often? Daily?
 - Little variance – no if/thens, creativity or decision making
 - Value – automating it will be valuable to your RTO



AUTOMATION STRATEGIES: COMMON HOTSPOTS

- Marketing, sales, social media
- Enrolment
- Payments
- Assessments: evidence and records
- Learner support and engagement
- Completion and certification
- Compliance house-keeping



AUTOMATION STRATEGIES

Observe your team using your software

Watch for friction points:

- Switching apps
- Copy/paste between apps
- Dependencies and delays

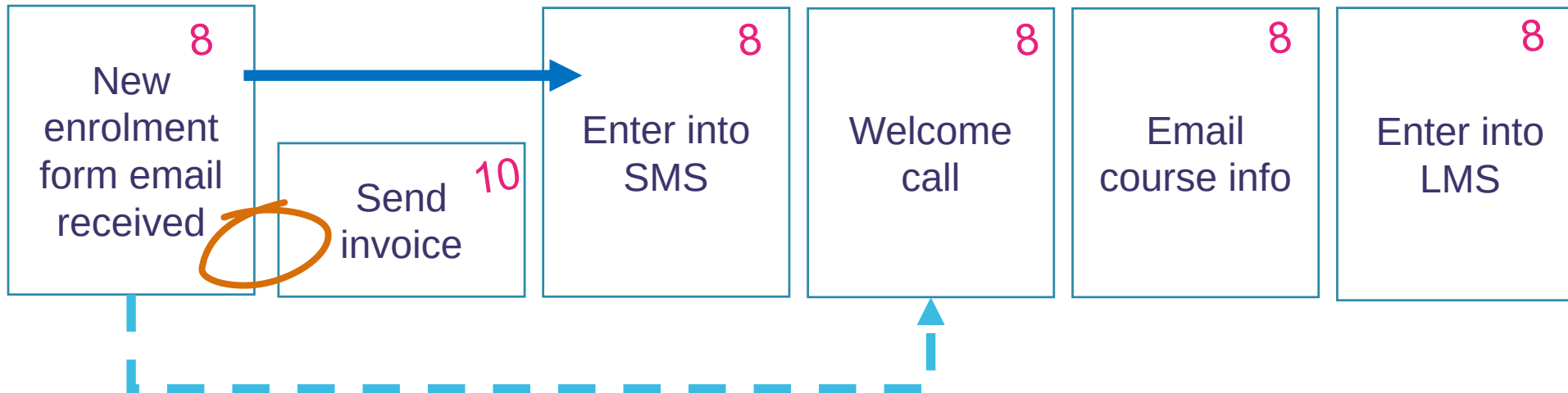
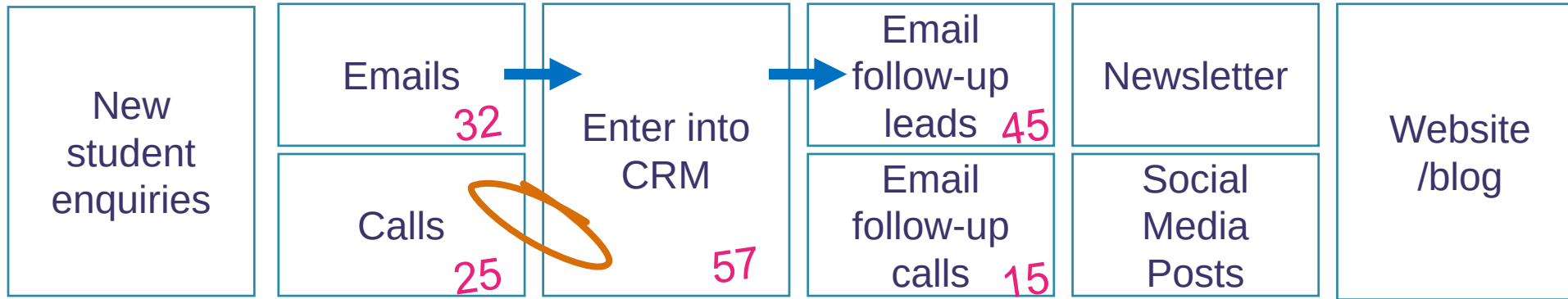
Review policies and procedures



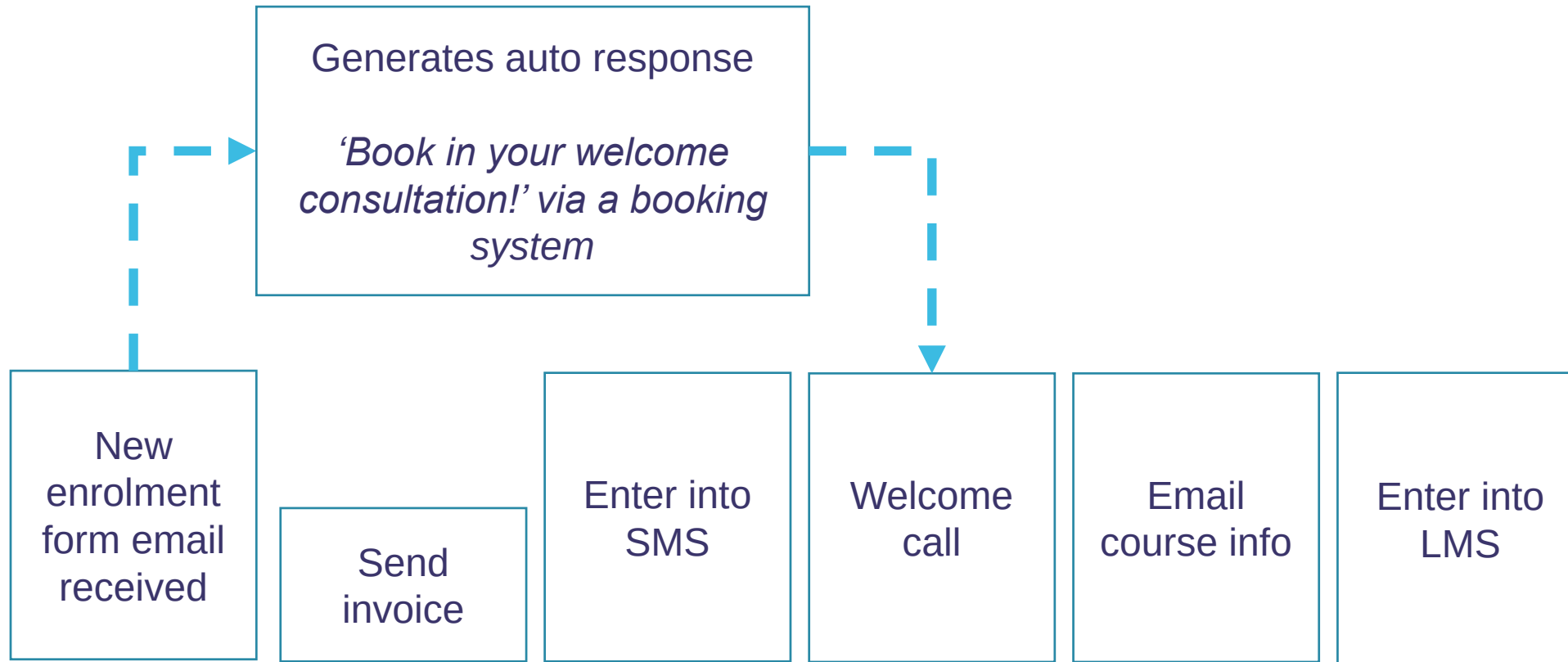
AUTOMATION STRATEGIES: PROCESS MAPPING

Look for:

- Flow
- Volume



AUTOMATION STRATEGIES: PROCESS MAPPING



WHAT NOT TO AUTOMATE

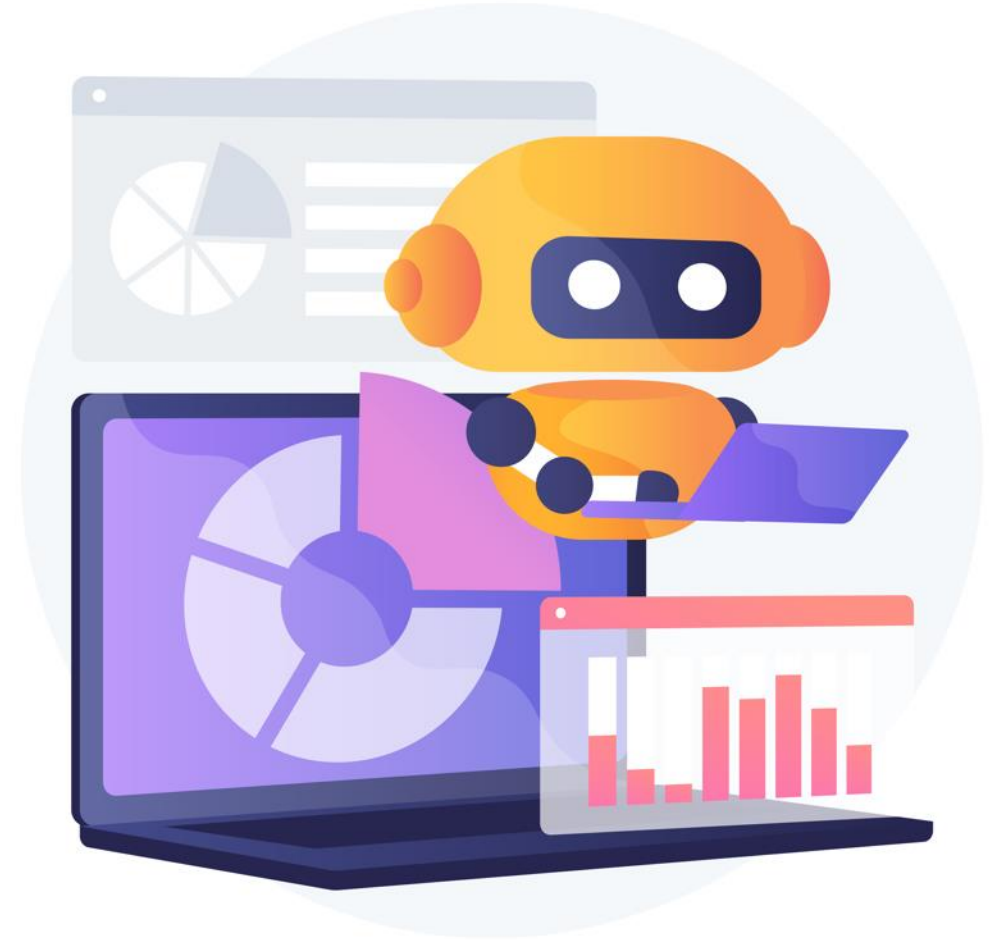
- Genuine human interaction
- Creative or complex tasks
- Tasks with many IF → THENs

CoBots?



OTHER AUTOMATION TOOLS

- integromat.com
- Automate.io
- www.n8n.cloud
- flow.microsoft.com
- IFTTT ifttt.com (If This Then That)
- Pipedream.com (advanced – uses Node.js)



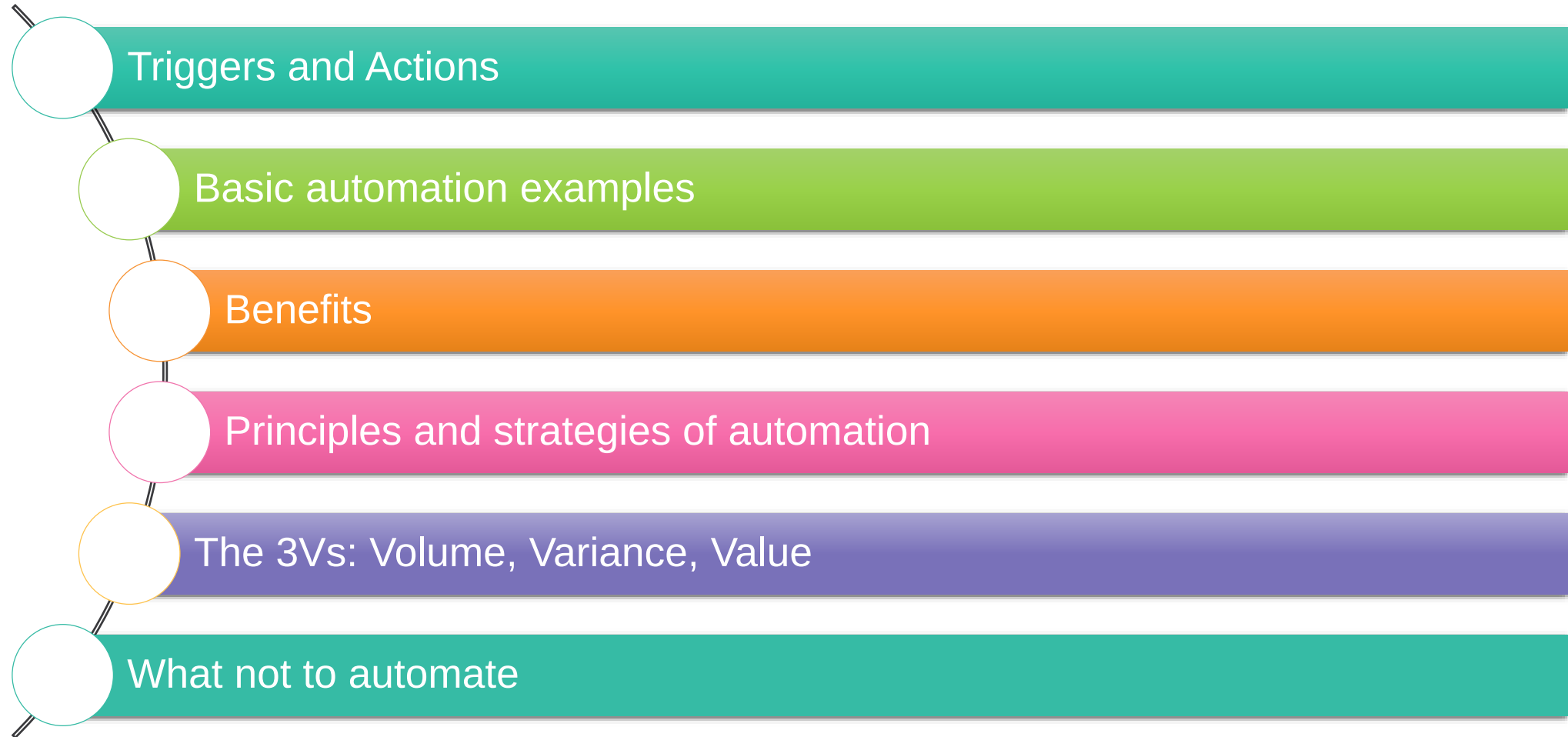
FREE RESOURCES

accellier.edu.au/resources/automation

Full examples from today
Plus more tutorials and examples
Canvas LMS, Zoom, Webhooks



WHAT WE HAVE COVERED...





THANK YOU FOR YOUR COMPANY

We really hope you enjoyed engaging with Paul for your session today.

If you have any queries or feedback relating to today's topic, or any general questions regarding your role within the VET sector, do not hesitate to contact the team at Velg Training.

Accellier

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COMING UP **NEXT:**

12.10 - 1.00PM



vision for the future

COMPLIANCE

**Welcome to VET:
Intro to the Standards
Part 2 of 2**

Michelle Charlton

TRAINING & STUDENT ENGAGEMENT

**Learning Differently -
Addressing the
challenges faced by
students with
Dyslexia and other
learning differences**

Karen Dymke

ASSESSMENT

**Influences of AQF on
Assessment Questions**

Anni Yaringa

RTO ADMINISTRATION

**What Auditors are
Looking for in
Completed Student Files**

Kevin Ekendal

EXPLORATION

**Re-Defining
Competency: Time for
a new approach**

Michael Hartman